



Tableau Training – A Comprehensive Training –  
Fundamentals, Advanced and Tableau Visual  
Analytics

From Yes-M Systems LLC

Student Location – To students from around the world

**Delivery Method:** Instructor-Led – Live online Training

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*Kudzu Reviews: <http://www.kudzu.com/m/Yes-M-Systems-30363491/reviews/>*

*Facebook: <http://www.facebook.com/yesmsystems>*

*Youtube: <http://www.youtube.com/yesmsystems>*

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## B. Tableau Training Course Details

### Tableau Fundamentals

#### Introduction

- Tableau Desktop and the Tableau Product Line
- Application Terminology
- Visual Cues for Fields

#### Connecting to Data

- Creating a Live Data Connection
- Saving a Data Source
- Sharing a Data Source
- Understanding Changes to Data
- Other Data Connection Options in Tableau

#### Creating Basic Visualizations

- Getting Started in Tableau Desktop
- Elements of Visualization
- Formatting Your View

#### Simplifying and Sorting Your Data

- Data Filtering
- Sorting

#### Organizing your Data

- Using Groups
- Creating and Using Hierarchies
- Creating a Combined Field
- Using Sets

#### Slicing your Data by Date

- Working with Dates
- Using Discrete Date Parts
- Creating Date Filters
- Defining a Fiscal Year
- Creating Custom Dates

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### Using Multiple Measures on the Same Axis

- Comparing Views with Multiple Measures
- Using Measure Values and Measure Names
- Combo Charts
- Combined or Shared Axis Charts
- Creating Dual Axis Charts

### Showing the Relationship between Numerical Values

- Options for Showing Numerical Relationships
- Creating Scatter Plots
- Creating Heat Maps

### Mapping Data Geographically

- Mapping in Tableau
- Geographic Mapping

### Viewing Distributions

- Bins and Histograms

### Viewing Specific Values

- Creating Crosstabs
- Creating Highlight Tables
- Grand Totals, Sub-totals, and Changing Aggregation

### Customizing your Data

- Calculation Types
- Creating Calculated Fields
- Using Logic Statements
- Type Conversions and Date Calculations
- Using Quick Table Calculations
- Calculations and Aggregations

### Using Parameters for Dynamic Values

### Showing Breakdowns of the Whole

- Pie Charts and Parts of the Whole
- Creating Tree Maps

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## Highlighting Data with Reference Lines

- Using Reference Lines and Reference Bands

## Showing Data History

- Creating Motion Charts

## Making Your Views Available

- Building Dashboards
- Dashboard Actions
- Using Drill Downs

## Sharing Your Work

- Export to an Image File
- Exporting the Data Only
- Other Sharing Options

## Tableau Advanced

### Introduction

- Review Fundamentals Concepts

### Working with Single Data Sources

- Desktop Data Architecture
- Using Data Extracts
- Custom SQL Data Connection

### Using Multiple Data Sources

- All about Joins
- Using Data Blending

### Using Calculations in Tableau

- Creating and Editing Calculated Fields
- Calculations Performed on the Database
- Calculations and Aggregations
- Aggregating Dimensions in Calculations
- Record Level Calculations for Date Conversion

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### Advanced Table Calculations

- Table Calculation Scope and Direction
- Null Values in Table Calculations
- Table Calculations for Statistical Analysis

### Creating and Using Parameters

- Using Parameters and Reference Lines
- Using Parameters with Filters

### Comparing Measures Against a Goal

- Showing Total Progress toward a Goal (Bar in Bar Graph)
- Showing Staged Progress toward a Goal (Bullet Graph)
- Showing the Biggest and the Smallest Values

### Tableau Geocoding

- How Tableau Performs Automatic Geocoding of Data
- Modifying Geocode Locations within Tableau
- Custom Geocoding

### Advanced Mapping

- Dual Axis Maps
- Mapping Paths
- Using Background Images for Spatial Analysis

### Showing Distributions of Data

- Creating a Pareto Chart
- Box and Whisker Plots
- Reference Distributions

### Statistics and Forecasting

- Trend Lines
- Forecasting

### Overview of Additional Visualizations

- Gantt Bar Chart (Program Management)
- Market Basket Analysis (Cohort Analysis)
- Spark lines

- Waterfall Charts

### **Dashboards: Quick Filters, Actions, and Parameters**

- Comparing Quick Filters, Actions, and Parameters
- Highlight Actions
- Filter Actions
- URL Actions

### **Dashboard Best Practices**

- Sizing
- Using Instructions
- Dashboard Formatting

### **Sharing Your Work**

- Sharing Packaged Workbooks
- Export to an Image File
- Exporting the Data Only
- Other Sharing Options

## **Tableau Visual Analytics**

### **Introduction**

- What is visual analytics?
- Strengths and weakness of the human visual system

### **Laying the Groundwork for Visual Analysis**

- Analytical process
- Preparing for analysis

### **Getting, Cleaning and Classifying Your Data**

- Cleaning, formatting and reshaping
- Classifying your data
- Using additional data to support your analysis

### **Visual Mapping Techniques**

- Working with human perceptual and cognitive process

- Encoding data into visual form
- Working with color

### Solving Real-World Problems

- Getting a feel for your data
- Time series analysis
- Looking up values - precision
- Comparing categories and measures
- Checking progress
- Mapping

### Communicating Your Findings

- Fine-tuning for more effective visualization
- Storytelling and guided analytics
- Dashboards

Disclaimer: Yes-M Systems and/or their instructors reserve the right to make any changes to the syllabus as deemed necessary to best fulfil the course objectives. Students registered for this course will be made aware of any changes in a timely fashion using reasonable means.

### C. About Yes-M Systems:

- Established in 2005 (Atlanta, GA, USA), 10<sup>th</sup> year in business.
- A+ accreditation from US Better Business Bureau  
(<http://www.bbb.org/atlanta/business-reviews/internet-consultants/yes-m-systems-in-duluth-ga-27431372>)
- Received the “Best of 2012” and “Best of 2013” awards from US-based Kudzu (<http://www.kudzu.com/m/Yes-M-Systems-30363491/reviews/>)
- Trained close to 3000+ students from all over the world.
- Experienced, passionate and committed trainers
- IT Training in various technologies including Java, Dot Net, SAP, Oracle, QA, BA etc (See Courses We offer section for more information)
- Professional guidance/help with resumes and interview preparations.



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- h. Recruiter help with marketing/jobs
  - i. Certification at the end of the training.

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